CRM 2011 Online AutoNumber Installation Manual V1.1

AutoNumber Managed Solution Code V1.0.0.3

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Solution File Installation

Login with a CRM administrator user account and in Microsoft Dynamics CRM 2011, go to the **Settings** area from navigation pane, and click on **Solutions** under the **Customization** group and click on the **Import** button.

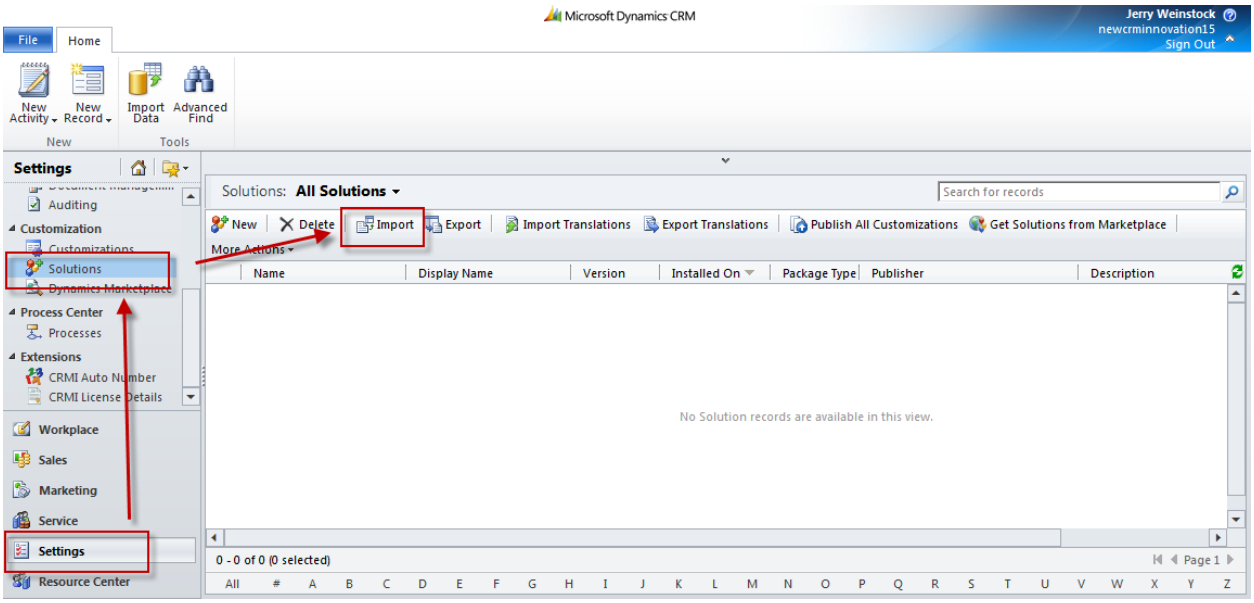

Figure -1 Import Solution

In Import Solutions wizard page, click on the browse button and select CRMI AutoNumber 2011 managed 1_x_x_x_x solution package file and click on the Next button.

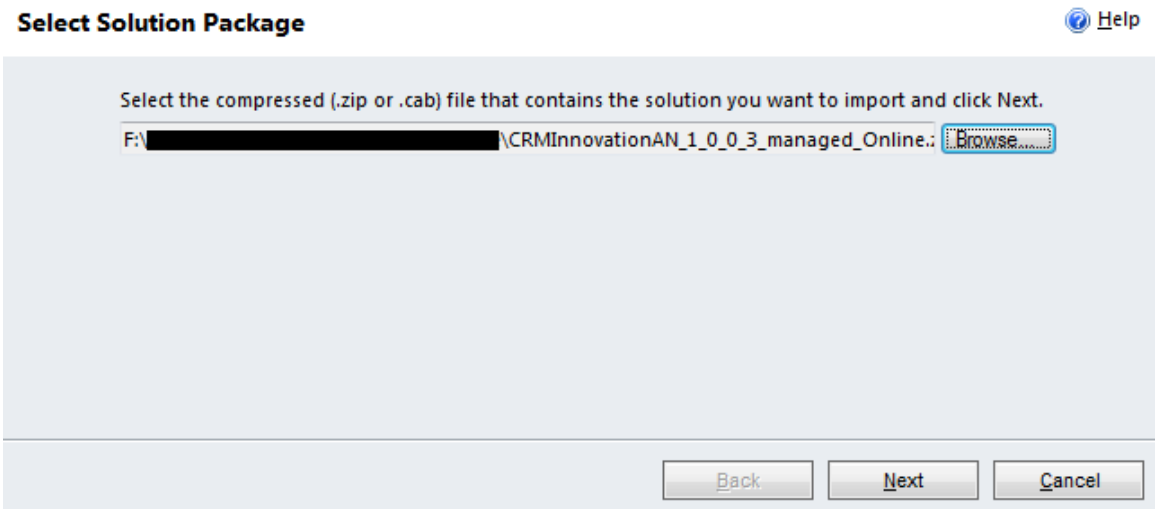

Figure -2 Select Solution Package Wizard Page

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In the Solution Information wizard page click on Next button.

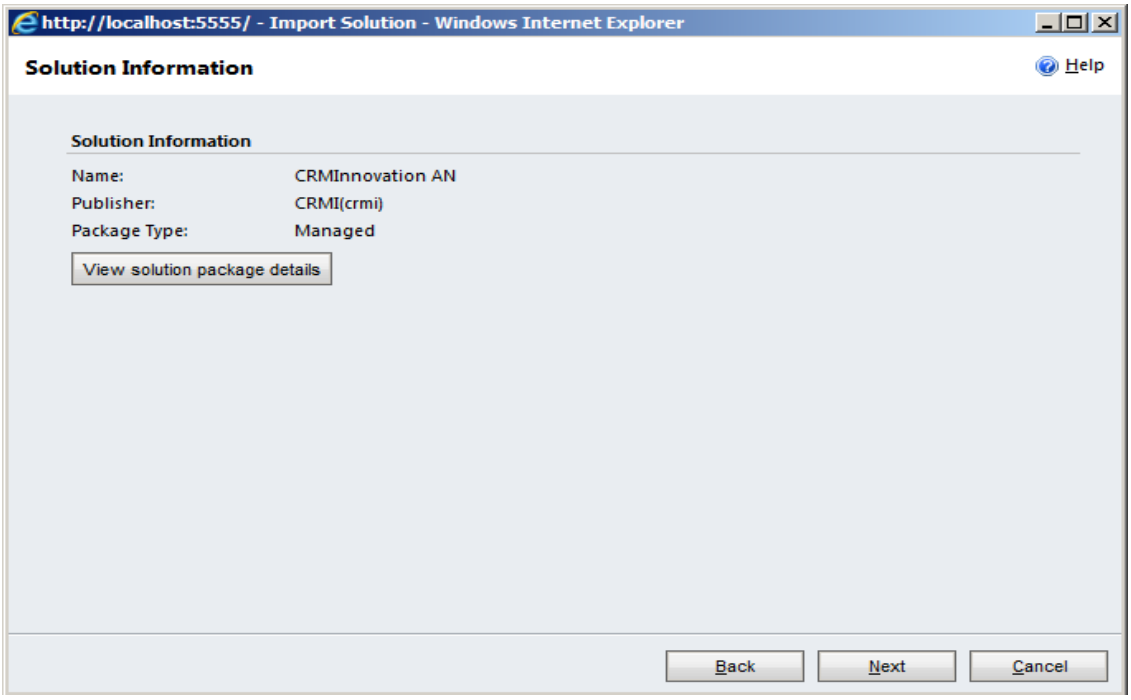

Figure -3 Solution Information Wizard Page

In **Import Options** wizard web page check option **Activate any processes and enable any SDK message processing steps included solution.** Click the Next button and then click on Close button. If you miss this step it will be necessary to redo the import of the Solution.

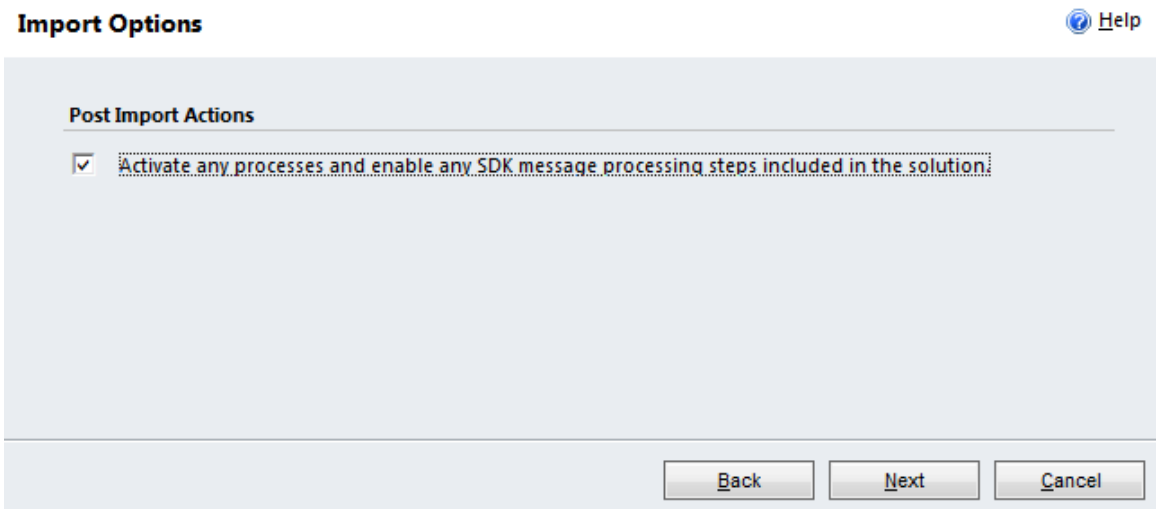

Figure -4 Import Options Wizard Page

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After the Solution has been successfully imported, the following screen is displayed. At this point, click on Close.

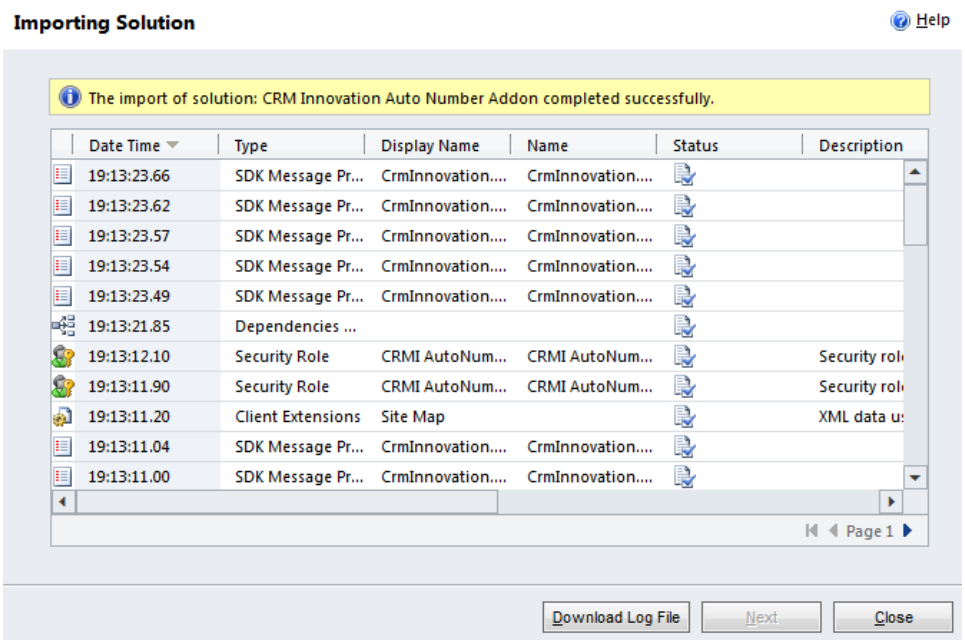
Importing Solution
Help
The import of solution: CRM Innovation Auto Number Addon completed successfully.
Date Time
Type
Display Name
Name
Status
Description
19:13:23.66 SDK Message Pr... CrmInnovation.... CrmInnovation....
19:13:23.62 SDK Message Pr... CrmInnovation.... CrmInnovation....
19:13:23.57 SDK Message Pr... CrmInnovation.... CrmInnovation....
19:13:23.54 SDK Message Pr... CrmInnovation.... CrmInnovation....
19:13:23.49 SDK Message Pr... CrmInnovation.... CrmInnovation....
19:13:21.85 Dependencies ...
19:13:12.10 Security Role CRMI AutoNum... CRMI AutoNum... Security rol
19:13:11.90 Security Role CRMI AutoNum... CRMI AutoNum... Security rol
19:13:11.20 Client Extensions Site Map XML data u
19:13:11.04 SDK Message Pr... CrmInnovation.... CrmInnovation....
19:13:11.00 SDK Message Pr... CrmInnovation.... CrmInnovation....
Page 1
Download Log File
Next
Close

Figure -5 Import Solution Wizard Page

Go to **Settings** area from navigation pane, click on **Solutions** menu item under **Customization** group and click on **Publish All Customizations** button.

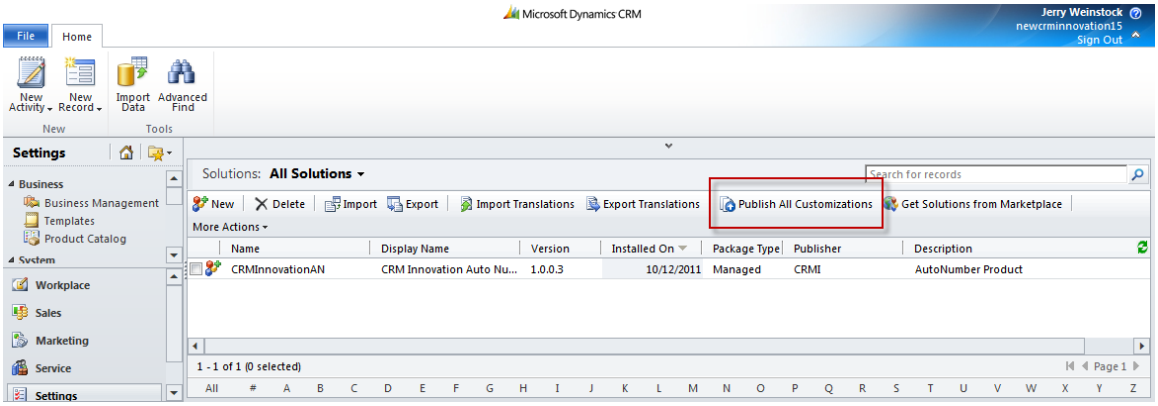

Figure -6 Publish All Customizations

Press F5 key or click on the browser Refresh button to refresh the CRM sitemap.

AutoNumber License Installation

Login with a CRM administrator user account and in Microsoft Dynamics CRM 2011, go to **Settings** area from navigation pane and click on **CRMI License Details** and click on **New** button.

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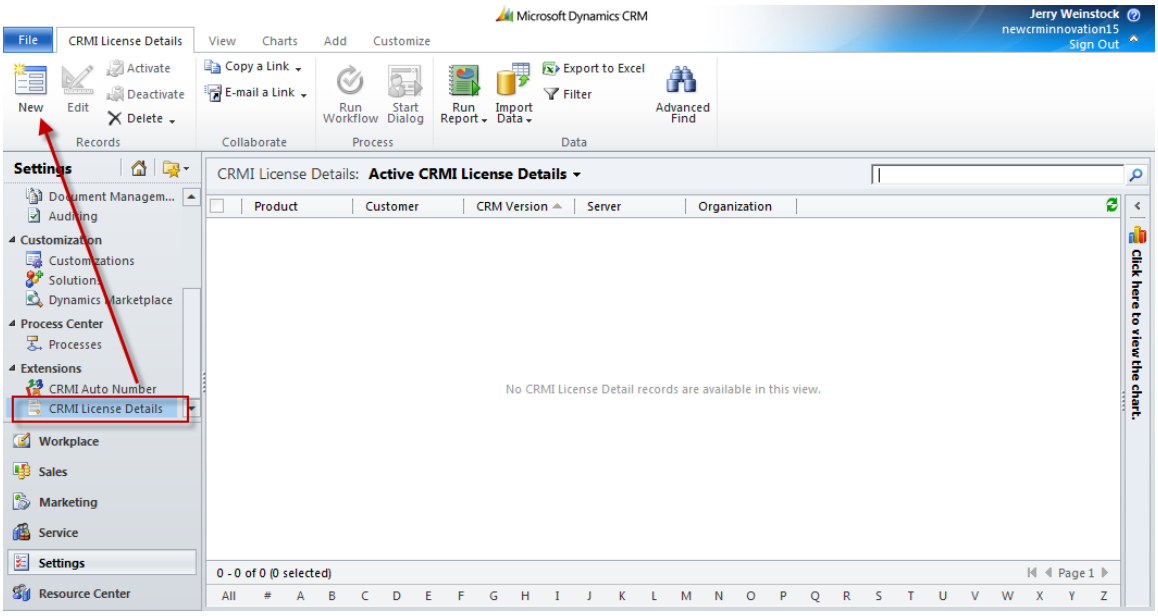

Figure -7 Create New CRM License Details

In the CRMI license details record, click on the **Browse** button, select the license file and then click on the **Save** button after the data is pulled into the screen. Note: Microsoft Silverlight is used for this form.

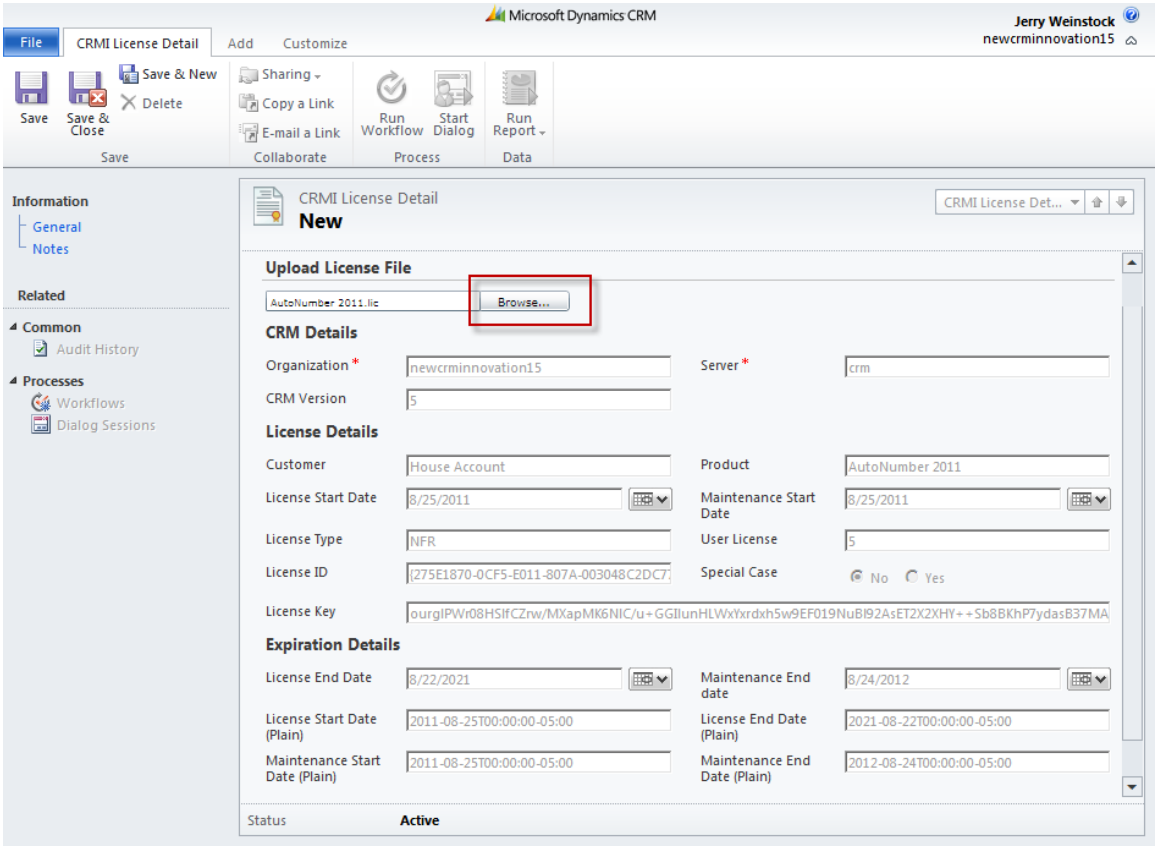

Figure -8 CRM License Details

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AutoNumber Configuration

In Microsoft Dynamics CRM 2011, go to **Settings** area from navigation pane and click on **CRMI License Details** and click on **New** button.

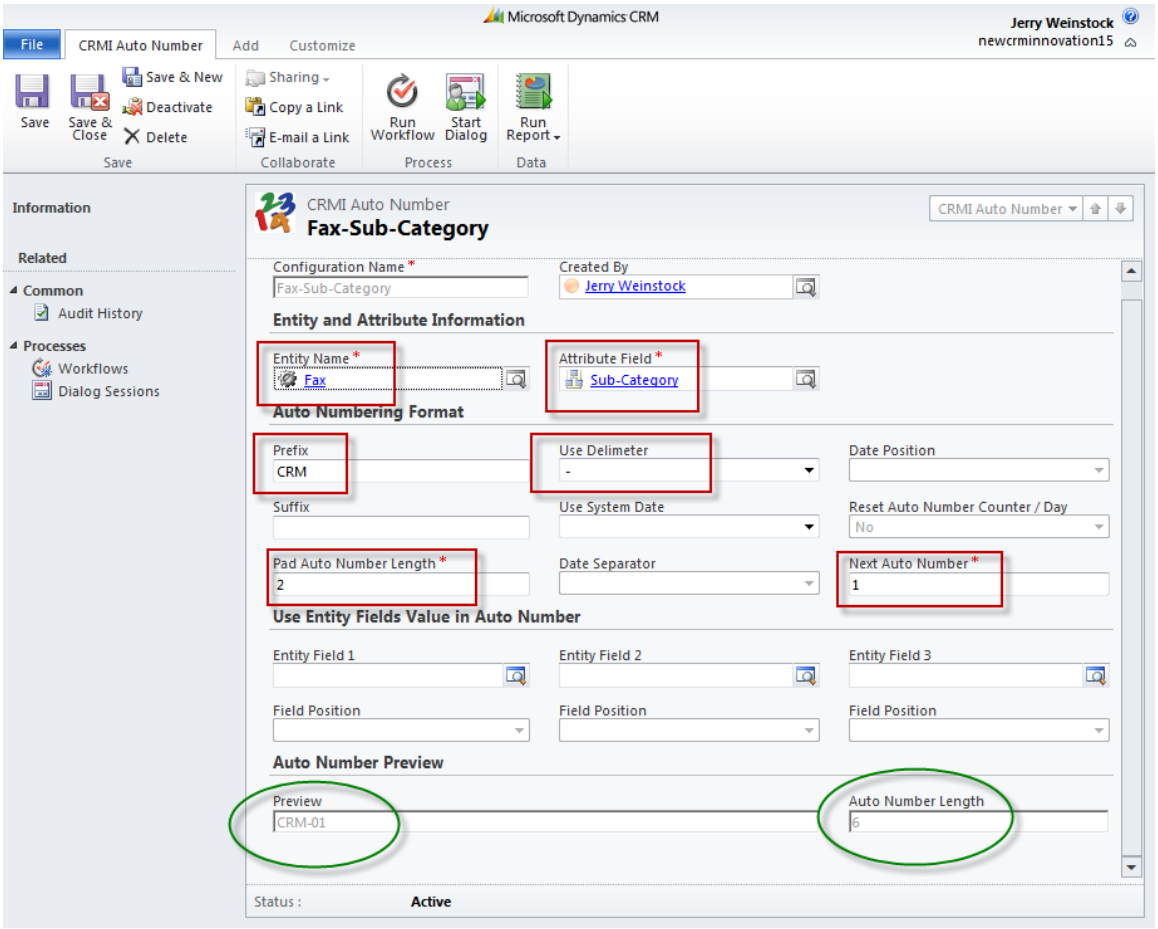

Figure -9 CRM AutoNumber

Enter AutoNumber configuration as per required.

Entity and Attribute Information:

1. In **Entity Name** field, select entity for which the AutoNumber is to be configured.

2. In **Attribute Field**, select attribute of the entity.

AutoNumbering Format:

1. In **Prefix** field, enter AutoNumber prefix value if required.

2. In **Suffix Field**, enter AutoNumber suffix value if required.

3. In **Pad AutoNumber length** field, enter AutoNumber auto incremented field length.

4. In **Use Delimiter** list choose the required AutoNumber values separator.

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5. In **Use System Date** field selection to use the current date in the AutoNumber value.

6. In **Date Separator** list choose the date format separator.

7. In **Date Position** list choose the AutoNumber date value position.

8. In **Reset AutoNumber Counter / Day** field, if using **System Date** in AutoNumber then can choose this option to Reset AutoNumber iincrement automatically at the end of the day.

9. In **Next AutoNumber** field, specify the increment initial value of AutoNumber sequence

Use Entity Fields Value in AutoNumbering:

10. In **Entity Field 1** field, choose entity attribute field value to be used in the AutoNumber

11. In **Field Position**, choose the entity field 1 attribute value position in the AutoNumber

12. In **Entity Field 2** field, choose entity attribute field value to be used in the AutoNumber

13. In **Field Position**, choose the entity field 2 attribute value position in the AutoNumber

14. In **Entity Field 3** field, choose entity attribute field value to be used in the AutoNumber

15. In **Field Position**, choose the entity field 3 attribute value position in the AutoNumber

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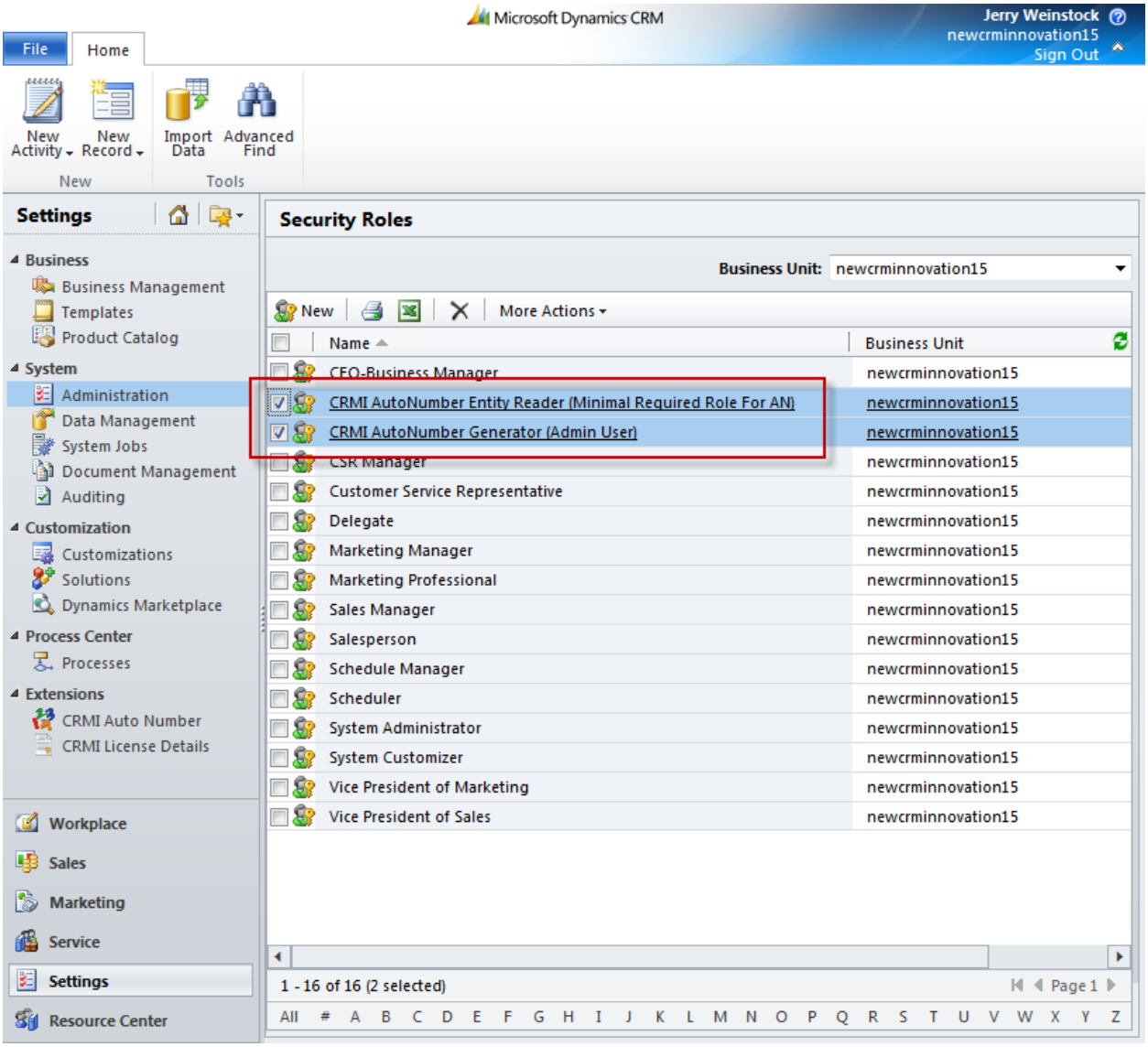
Security Roles

The solution automatically creates two custom security roles.

CRMI AutoNumber Entity Reader (Minimal Required Role for AN) – all users must have this role added to their profile if they are going to be creating any CRM records that use Auto Numbers.

CRMI AutoNumber Generator (Admin User) – any user that needs to be able to create, edit, delete a CRMI Auto Number record must have this role.

If the user is already a CRM Administrator they already have all the necessary priveleges.



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Custom Entities

If you create a custom entity or add custom attributes after you install the Solution they will automatically be available in the AutoNumber Record form to use with the application once you have published the new entity or attribute.

Uninstalling the Solution

To uninstall the solution do the following:

1. Delete all CRMI Auto Number records
2. Delete the CRM License Details record.
3. Delete the CRMInnovationAN Solution

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